

MITEL

# 5240 | IP Appliance

USER GUIDE

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# ABOUT THE 5240 IP APPLIANCE

The Mitel Networks 5240 IP Appliance is a digital telephone that also serves as a gateway to your company network, providing you with real-time access to applications and services such as web browsing, directory management and visual voice mail.

The 5240 IP Appliance features a full-duplex speakerphone that allows you the freedom to work at your computer during calls; the six command keys and nine programmable quick keys provide convenient access to features. Programming the quick keys is simple thanks to the easy-to-follow screen prompts. For even easier programming use the Desktop Tool, a companion application for the 5240 IP Appliance that runs on a PC.



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## 5240 IP Appliance Features

<b>Feature</b>	<b>Function</b>
1 - Ringing Indicator	flashes to signal an incoming call.
2 - Audio Device Controls	switches between headset and handset operation; mutes the handsfree microphone; and adjusts the sound level.
3 - Command Keys	invokes the command or function described by the adjacent label. The command or function changes according to the screen you are in.
4 - Telephony Feature Keys	enables and disables Handsfree operation; places calls on <b>Hold</b> . The <b>Speech Recognition</b> key dials the automated attendant or other service as determined by system programming.
5 - Application Keys	accesses functions, services, and applications provided on the 5240 IP Appliance. See <i>Using the Applications</i> for more information.
6 - Message Indicator	flashes when you have a new voice message.
7 - InfraRed Transceiver Lens	links the 5240 IP Appliance to a Palm® Handheld™ Personal Digital Assistant (PDA) enabling users to speed dial calls from their Palm OS address book or to access features and telephone numbers programmed on their own extension. For more information on using the PDA, refer to the Mitel Networks PDA and IrDA Module technical documentation.
8 - Display Screen	provides a large, high-resolution viewing area for ease of use.
9 - Quick Keys	invoke the command or function indicated by the adjacent label. The bottom quick key is always your Prime Line; the remaining quick keys are programmable.
10 - Navigation Keys	scrolls the display to the next or previous page. The left arrow key backspaces, erasing any characters to the left. The right arrow key inserts spaces. OK performs the default command on a selected item.
11 - Dialpad Keys	used for dialing when in phone mode and to enter characters when in application mode.

## **TIPS FOR YOUR COMFORT AND SAFETY**

### **Don't cradle the handset!**

Prolonged use of the handset can lead to neck, shoulder, or back discomfort, especially if you cradle the handset between your ear and shoulder. If you talk on the phone a lot, you may find it more comfortable to use a headset. See *Headset Operation* for more information.

### **Protect your hearing**

Your 5240 IP Appliance has a control for adjusting the volume of the handset receiver or headset. Because continuous exposure to loud sounds can contribute to hearing loss, keep the volume at a moderate level.

### **Adjusting the viewing angle**

The stand built into your 5240 IP Appliance tilts to give you a better view of the keys.

*To adjust the viewing angle:*

1. Depress the button on the stand at the back of the set.
2. Slide the stand in or out to achieve the desired angle.
3. Release the button.

## **FOR USERS ON RESILIENT 3300 ICP SYSTEMS**

If during a call, you hear two beeps repeated every 20 seconds it means that your phone is switching to a secondary 3300 ICP system. The call continues but the keys and features on your phone stop working. The keys and most features begin working again after you hang up. Normal operation resumes when your phone switches back to the primary system. If your phone is idle and switched to the secondary system, you'll see a flashing rectangle on the display. The rectangle remains until the switch to the primary system is complete.



# CUSTOMIZING YOUR 5240 APPLIANCE

## Ringer Control

*To adjust the Ringer Volume while 5240 IP Appliance is ringing:*

- Press the volume control buttons located above the display.

*To adjust the Ringer Volume or Pitch while the 5240 IP Appliance is idle:*

1. Press **SETTINGS**.
2. Press the **More** command key.
3. Press the **Ring Adjust** command key.
4. Press the **Ringer Vol** or **Ringer Pitch** command key.
5. Press the volume control buttons located above the display to adjust the volume or pitch.
6. Press **SETTINGS**.

## Handset, Headset and Speakerphone Volume

*To adjust the volume of the active receiver:*

- Press the volume control buttons located above the display.

## Display Contrast Control

*To adjust the Display Contrast while the 5240 IP Appliance is idle:*

- Press the volume control buttons located above the display.

## Quick Key Programming

You can program your quick keys using the 5240 IP Appliance or the Desktop Tool. The Desktop Tool is a companion application for the 5240 IP Appliance that runs on a PC. It allows you to label the quick keys that you programmed. The labels appear on the display and cannot be assigned from the 5240 IP Appliance itself.

*To display the feature that is currently programmed to a quick key:*

1. Press **SETTINGS**.
2. Press a quick key.
3. Press another quick key or **SETTINGS** to exit the Settings menu.

*To program a quick key:*

1. Press **SETTINGS**.
2. Press a quick key.
3. Do one of the following:
  - To re-program the key, press the **Change Key** command key, and then select a new feature.
  - To clear the key, press the **Clear Key** command key.
4. Press **SETTINGS** to exit the Settings menu.

### Notes:

1. Use the Desktop Tool to assign labels to the quick keys.
2. When programming speed dial numbers you can insert a pause for dial tone in the number by pressing **SETTINGS**, followed by a quick key, and then the **Insert Pause** command key at the appropriate point; this inserts a four second delay, for example, 1234P5678. The system dials 1234, waits four seconds, then dials 5678. If required, you can insert multiple pauses.

## Language Change

*To change the language on the display:*

1. Press **SETTINGS**.
2. Press the **More** command key until **Language** appears.
3. Press the **Language** command key.
4. Press the command key for the desired language.
5. Press **SETTINGS** to exit the Settings menu.

## MAKING AND ANSWERING CALLS

### Make a call

1. If necessary, press **PHONE VIEW** to exit the current application.
  - Press the quick key associated with the party you want to call.
  - Dial the number using the dialpad keys.
2. Continue the call using the speakerphone or lift the handset.

### Answer a call

Do one of the following:

- Lift the handset or press **HANDSFREE**.  
*The current application will remain open.*
- Press **PHONE VIEW** to exit the current application, and then lift the handset or press **HANDSFREE**.  
*Pressing PHONE VIEW will allow you to see the caller information.*

### End a call

Do one of the following:

- To end a handsfree call, press the **Hang Up** command key.
- To end a handset call, replace the handset.

### Redial

*To redial the last number that you manually dialed:*

1. Lift the handset.
2. Press **Redial** command key.

## **Redial - Saved Number**

*To save the last number that you manually dialed:*

1. Lift the handset.
2. Dial **\*\*79**.

*To Redial a saved number:*

1. Lift the handset.
2. Dial **\*6\***.

## **Speed Call - Personal**

*To store a personal Speed Call number:*

1. Press **SETTINGS**.
2. Press the **More** command key.
3. Press **Speed Call** command key.
4. Press a quick key that isn't a line key.
5. Do one of the following:
  - To enter a new number, dial the number.
  - To enter the last number dialed, press the **Redial** command key.
6. If you want the number to be private, press the **Make Private** command key.
7. Press the **Save** command key.
8. Press **SETTINGS** to exit the Settings menu.

**Note:** Use the Desktop Tool to assign labels to the quick keys.

*To dial a stored personal Speed Call number:*

1. Lift the handset.
2. Press a Speed Call quick key.

## Handsfree Operation

*To enable Handsfree Operation:*

- Press **HANDSFREE**.

*To switch from Handsfree to Handset operation during a call:*

- Lift the handset.

*To temporarily disable/enable the microphone during Handsfree Operation:*

- Press **MICROPHONE** (the microphone LED turns on when the microphone is disabled).

*To end a Handsfree call:*

Do one of the following:

- Press **HANDSFREE**.
- Press the **Hang Up** command key.

## Auto-Answer

This feature automatically connects internal calls to your extension. Calls are announced by a single burst of ringing; then, the microphone and speaker are activated and the call is answered. You can continue the call handsfree or use the handset.

*To enable or disable Auto-Answer:*

- Press **Auto-Answer** quick key.  
(See *Quick Key Programming for instructions on programming features to your phone.*)

*To answer a call when you hear ringing:*

- Communicate by using the speaker and the microphone.

*To end a call:*

- Press the **Hang Up** command key.  
-OR-  
Wait for the caller to hang up.

# CALL HANDLING

## Hold

*To place a call on Hold:*

- Press **HOLD**.

*To retrieve a call from Hold:*

1. Lift the handset.
2. Press the line key with the flashing icon.

*To retrieve a call from Hold at another extension:*

- Press the flashing line key.  
-OR-  
Dial **\*\*1** and the number of the extension that placed the call on Hold.

## Transfer

*To Transfer an active call:*

1. Press **Trans/Conf** command key.
2. Dial the number of the next party.
3. Do one of the following:
  - To complete the Transfer, hang up or press the **Release Me** command key.
  - To announce the Transfer, wait for an answer, consult, and then hang up.
  - To return to the first call before completing the transfer, press the **Back To Held** or **Trade Calls** command key.

## Conference

*To set up a Conference when a two-party call is already established, or to add another party to an existing Conference:*

1. Press **Trans/Conf** command key.
2. Dial the number of the next party.
3. Wait for an answer.
4. Press the **Trans/Conf** command key.

*To leave a Conference:*

- Hang up.

## Conference Split

*To split a conference and speak privately with the original party:*

- Press the **Split** command key.

## Add Held

*To move a call on Hold to another line appearance:*

1. Press the available line key.
2. Press the **Add Held** command key.
3. Press the line key with the flashing icon.

*To add a call on Hold to an existing conversation or conference:*

1. Press the **Add Held** command key.
2. Press the line key with the flashing icon.

## Swap

*To call another party when you are in an established two-party call:*

1. Press **Trans/Conf**.
2. Dial the number.

*To alternate between the two parties:*

- Press the **Trade Calls** command key.

## Call Forward

Call Forward lets you redirect incoming calls to an alternate number when your phone is busy, when you're not answering, or all the time.

"Busy" (Internal, External, and Both) redirects your calls when your telephone is busy. "No Answer" (Internal, External, and Both) redirects your calls after several rings if you don't answer. "Always" redirects all incoming calls regardless of the state of your telephone.

**Note:** For information about using the **To Me** command key, see *Call Forward - Remote*.

*To program Call Forward:*

1. Press **SETTINGS**.
2. Press the **More** command key.
3. Press the **Forwarding** command key.
4. Select a type of Call Forward. (For information about Call Forward To Me, see *Call Forward - Remote*.)
5. Do one of the following:
  - To forward only internal calls, press the **Internal** command key.
  - To forward only external calls, press the **External** command key.
  - To forward both internal and external calls, press the **Both** command key.
6. Dial the destination number.
7. Press the **Save/On** or press the **Save/Off** command key.
8. Press **SETTINGS** to exit the Settings menu.

*To turn Call Forward on and off (once it has been programmed):*

1. Press the **Forwarding** command key.
2. Press the **Next** command key until the type of Call Forward appears.
3. Press the **Turn Fwd On** or press the **Turn Fwd Off** command key.
4. Press **SETTINGS** to exit the Settings menu.



*To cancel Call Forward:*

1. Press **SETTINGS**.
2. Press the **More** command key.
3. Press the **Forwarding** command key.
4. Select the type of call forwarding.
5. Press the **Save/off** command key.
6. Press **SETTINGS** to exit the Settings menu.

## **Call Forward - Remote**

*To forward calls from a remote extension to your extension:*

1. Press **SETTINGS**.
2. Press the **More** command key.
3. Press the **Forwarding** command key.
4. Press the **To Me** command key.
5. Dial the number of the remote extension.
6. Press the **Save/On** command key.
7. Press **SETTINGS** to exit the Settings menu.

*To cancel Call Forward - Remote from the extension that set it:*

1. Lift the handset.
2. Dial **\*\*77**.
3. Dial the number of the remote extension.
4. Hang up.

*To cancel Call Forward - Remote from the extension that was forwarded:*

1. Press **Forwarding** command key.
2. Press the **Turn Fwd Off** command key.
3. Press **SETTINGS** to exit the Settings menu.

## Call Forward - End Chaining

*To ensure that calls do not get forwarded again by the destination number:*

1. Lift the handset.
2. Dial **64**.
3. Hang up.

*To again allow calls to be forwarded by the destination number:*

1. Lift the handset.
2. Dial **\*\*73**.
3. Hang up.

## Call Forward - Forced

*To force an incoming call to be forwarded:*

- Press the **Forward Call** command key.

## Call Forward - Override

*To override Call Forward and ring an extension:*

1. Lift the handset.
2. Dial **\*1\***.
3. Dial the extension number.

## Messaging - Advisory

This feature displays a message on a calling extension's phone to say that you are, for example, on vacation, off sick, or in a meeting.

*To turn Messaging - Advisory on or off:*

1. Do one of the following:
  - Press **SETTINGS**.
  - Press the **Messaging** command key.
2. Press the **More** command key.
3. Press the **Messaging** command key.
4. Press the **Advisory** command key.
5. Press the **Next Msg** command key until the desired message appears.
6. Press the **Turn Msg On** or **Turn Msg Off** command key.
7. Press **SETTINGS** to exit the Settings menu.

## **Messaging - Callback**

*To leave a message waiting indication on a telephone when you hear busy or ringback tone:*

- Press **Leave A Msg** command key.

*To respond to a message waiting condition on your telephone:*

Do one of the following:

- Press **Messaging** followed by **Call**.
- Lift the handset, and then press **Messaging**.

A call is placed to the message sender (voice mail system or extension user) that left the oldest message.

*To read messages before responding:*

1. Press the **Messaging** command key.
2. If a password is required, enter your password and press the **Enter** command key.
3. Press the **Read Message** command key.
4. Press the **Call Me Back** command key.
5. Do one of the following:
  - To call the message sender, press the **Call** command key.
  - To delete the message, press the **Erase Msg Call** command key.
  - To view the next message, press the **Next Msg** command key.

*To check for messages from a remote extension:*

1. Press the **Messaging** command key.
2. Press the **Remote Msgs** command key.
3. Dial your extension number.
4. Press the **Enter** command key.
5. If a password is required, enter your password and press the **Enter** command key.
6. Press the **Read Message** command key.

*To set a password (up to 7 digits, not including 0):*

1. Press the **Messaging** command key.
2. Press the **New Password** command key.
3. Enter a password.
4. Press the **Enter** command key.
5. Enter the password again.
6. Press the **Enter** command key.
7. Press **SETTINGS** to exit the Settings menu.

*To change or clear your password:*

1. Press the **Messaging** command key.
2. Press the **New Password** command key.
3. Enter your current password.
4. Press the **Enter** command key.
5. Press the **New Password** command key.
6. Enter your current password.
7. Press the **Enter** command key.
8. Do one of the following:
  - To change your password, enter a new password and press the **Enter** command key.
  - To clear your password, press **0**.
9. Press **SETTINGS** to exit the Settings menu.

# USING OTHER FEATURES

## Account Codes

An account code is a series of digits that you assign to your calls, usually for accounting purposes. The code identifies the account in the call records that your system generates. A *forced* account code is usually entered from another extension, enabling you to use features or make calls that the extension otherwise could not. If you want this feature, ask your System Administrator.

### *To use Forced Account Codes:*

1. Lift the handset.
2. Dial the Account Code digits.
3. Do one of the following:
  - To submit the Account Code, press the **#** key.
  - To correct an entry error, press the **←** command key.
  - To cancel, press the **Cancel** command key.

### *To enter an Account Code during a call:*

1. Press the **Account Code** command key.
2. Dial the account code digits.
3. Do one of the following:
  - For a verified account code, press the **Verify/Save** command key.
  - For a non-verified account code, press the **Save** command key.

## Callback

*To request a Callback when you reach a busy or unanswered station:*

- Press the **Call Me Back** command key.

*To answer a Callback:*

- Lift the handset.

*To view and/or cancel outstanding Callbacks:*

1. Press **SETTINGS**.
2. Press the **More** command key.
3. Press the **Callbacks** command key.
4. Press the **Next** and **Previous** command keys (if required).
5. Do one of the following:
  - To cancel a callback, press the **Cancel** command key.
  - To call the number shown, press the **Call Again** command key.

## Call Park

*To retrieve a call parked by the attendant:*

1. Lift the handset.
2. Dial **\*23**.
3. Dial the console ID and the Hold Slot number.

## Call Pickup

*To answer a call that is ringing at another extension in your Pickup Group:*

1. Lift the handset.
2. Press the **Pickup Call** command key.  
(See *Quick Key Programming* for instructions on programming features to your phone.)

*To answer a call that is ringing at a extension not in your Pickup Group:*

1. Lift the handset.
2. Dial **\*\*6**.
3. Dial the number of the ringing station.

## **Campon**

*To Campon to a busy station:*

- Press the **I Will Wait** command key.

*To retrieve a call when you hear Campon tone:*

1. Press the **Call Waiting** command key.
2. Press the **Trade Calls** command key.

## **Do Not Disturb**

*To activate or deactivate Do Not Disturb:*

- Press the **Do Not Disturb** quick key.

*To activate Do Not Disturb from a remote extension:*

1. Lift handset.
2. Dial **\*\*5**.
3. Dial the number of the station to which Do Not Disturb is to apply.
4. Hang up.

*To deactivate Do Not Disturb from a remote station:*

1. Lift handset.
2. Dial **##5**.
3. Dial the number of the station with Do Not Disturb activated.  
(See *Quick Key Programming for instructions on programming features to your phone.*)
4. Hang up.

## **Override (Intrude)**

*To use Override when you encounter busy tone:*

- Press the **Intrude** command key.

*To use Override when you encounter Do Not Disturb tone:*

- Press the **Ring Anyway** command key.

## Paging

*To use Paging:*

1. Lift handset.
2. Press the **Pager** quick key.  
*(See Quick Key Programming for instructions on programming features to your set.)*
3. Dial the Paging zone number (if required).
4. Make the announcement.



## Direct Paging

Direct Paging allows you to page a party through their telephone speaker.

*To page another extension user:*

1. Lift the handset.
2. Press the **Direct Paging** quick key.  
(See *Quick Key Programming for instructions on programming features to your set.*)
3. Dial the extension number.
4. Speak to the dialed party after the tone.

If Handsfree Answerback has been turned on at your phone and you receive a Direct Page while your phone is idle, or while you are on a handset or headset call, a handsfree call will automatically be established after a single burst of tone.

The following instructions assume that Handsfree Answerback is not enabled on your phone.

*To answer a Direct Page (indicated by a single burst of tone):*

- Lift handset.  
- OR -  
Press **MICROPHONE**.

*To answer a page while using the handset:*

- Press **MICROPHONE**.

*To enable or disable Handsfree Answerback:*

- Press **MICROPHONE** while your phone is idle.

## Reminder

*To program a Reminder:*

1. Press **SETTINGS**.
2. Press the **Reminder** command key.
3. Enter the time in 24-hour format.
4. Press the **Save** command key.
5. Press **SETTINGS** to exit the Settings menu.

*To view, change, and/or cancel a pending Reminder:*

1. Press **SETTINGS**.
2. Press the **Reminder** command key.
3. Do one of the following:
  - To change the Reminder, enter the new time and press the **Save** command key.
  - To cancel the Reminder, press the **Cancel** command key.
  - To exit without canceling the Reminder, press **SETTINGS** to exit the Settings menu.

*To acknowledge a Reminder when your phone rings once:*

- Press the **Acknowledge** command key.

## Headset Operation

*To enable Headset Operation:*

- Press the **Headset** key located above the display.

*To answer a call (when Auto Answer is disabled):*

- Press the line key with the flashing icon.

*To hang up:*

- Press the **Hang-Up** command key.

*To disable Headset Operation:*

- Press the **Headset** key.

## Headset Operation (with Feature Control Switch)

**IMPORTANT NOTE:** Mitel Networks Headsets with Feature Control Switch must be installed in the dedicated headset jack on the back of the phone. Installation will disable your handset microphone. Disconnecting the headset at the jack or at the quick-disconnect plug restores handset operation. If handset operation is required for an extended period of time, you should press the Headset feature key to return the telephone to handset mode.

*To enable Headset Operation:*

- Press the **Headset** key.

*To answer a call:*

- Press line key with the flashing icon.  
-OR-  
Quickly press and release the headset's feature control switch.

*To mute the headset microphone:*

- Press and hold the headset's feature control switch.

*To hang up:*

- Press **Hang-up** command key.  
-OR-  
Quickly press and release the headset's feature control switch.

*To disable Headset Operation:*

- Press the **Headset** key.

## Music

*To turn Music on and off when the phone is idle:*

Do one of the following:

- To turn the music on, press the **Music On** command key.
- To turn the music off, press the **Music Off** command key.

## Calculator

*To use the Calculator:*

1. Press **SETTINGS**.
2. Press the **Calculator** command key.
3. Use the telephone keypad as the numeric keypad.  
The \* key is used as a decimal point key. The following operations as well as the Clear Entry/Clear (CE/CLR) and another decimal point are presented as command keys: (  $\times$ ,  $\div$ , -, +, /, = )
4. Press **SETTINGS** to exit the Settings menu.

## Group Paging / Meet Me Answer

Group Paging allows you to page a group of telephones through their built-in speakers. You can belong to as many as three paging groups with one group designated as your "prime" group.

When you need to respond to a Group Page but don't know the identity or extension number of the paging party, use the Meet Me Answer feature. You have up to 15 minutes after receiving the page to use Meet Me Answer.

### *To make a Group Page:*

1. Lift the handset.
2. Press **Direct Page** or dial **\*37**.
3. Do one of the following:
  - To page your prime page group, press **#**.
  - To page a specific page group, dial the page group directory number.
4. Speak to the dialed party after the tone.

### *To respond to a Group Page by using Meet Me Answer:*

1. Lift handset.
2. Press the MME quick key or dial **\*88**.  
*(See Quick Key Programming for instructions on programming features to your phone.)*
3. Do one of the following:
  - To respond to a page from your prime page group, press **#**.
  - To respond to a page from a specific page group, dial the page group directory number.

## Trunk Flash

The Trunk Flash feature allows you to access Centrex features (if available) while you are talking on an outside call.

*To flash a trunk while talking on an outside call:*

1. Press **TRANS/CONF**.
2. Dial **\*57** for a single flash or **\*56** for a double flash.
3. Wait for dial tone.
4. Dial the Centrex feature access code.

## Record a Call

This feature uses your voice mail system to record your telephone conversations.

**Note:** You may be required by law to inform the other party that you are recording the conversation. For specific instructions, consult your System Administrator.

*To start recording while on a two-party call:*

- Press the **Record Call** command key.

**Note:** Your system may be programmed to automatically begin recording external calls when you or the other answers.

*To pause recording:*

- Press the **Pause** command key.

*To resume recording after pausing:*

- Press the **Resume** command key.

*To stop a recording without saving it:*

- Press the **Stop&Erase** command key.

*To stop and save a recording:*

- Press the **Stop&Save** command key.

Putting the call on hold saves the recording; taking the call off hold starts a new recording. Depending on system programming, hanging up, or pressing **TRANS/CONF** or a **DSS/BLF** key, may also save the recording.

*To listen to a recording:*

1. Lift the handset.
2. Access your voice mailbox.
3. Follow the prompts to retrieve the recording.

## Hot Desking

Hot Desking allows you to log into the telephone system from any phone designated as a Hot Desk phone. Simply log in at the phone using your assigned Hot Desk User Extension Number and the phone immediately assumes all your speed dials, features keys, call forwarding setup, and line appearances - even your language preference for the display. Any changes you make to the phone while you are logged in--for example, adding a speed dial--are saved to your personal profile. Logging in activates your profile on any phone that supports Hot Desking.

**Note:** All Hot Desking profiles have 13 programmable keys. If you log into a phone that has a fewer number of keys, the extra ones are "hidden". Only the use of the extra keys is lost, not the features assigned to them.

*To log into a Hot Desking phone (the phone must be idle):*

1. From the Phone View screen, press the **HotDesk** command key.
2. Press the **Login** command key.
3. Enter your Hot Desk User Extension Number, and then press the **OK** command key.

*To log out of Hot Desking phone (the phone must be idle):*

1. From the Phone View screen, press the **HotDesk** command key.
2. Press the **Logout** command key.
3. Press the **Confirm** command key.

**Note:** Your profile can only be active on one phone at a time. If you log in from another phone without logging out from the first one, the system will automatically deactivate your profile on the first phone.

### Hot Desk Remote Logout

A user that has forgotten to log out of a Hot Desking phone can be logged out using any phone that supports Hot Desk Remote Logout.

*To remotely log out a Hot Desking phone:*

1. From the Phone View screen, dial **111**.
2. Dial the Hot Desk User Extension Number that you want to log out.



## Tag Call

Tag Call allows you to signal that you are the victim of a threatening or malicious call. Using the tag, your system administrator or telephone company can identify the source of the call and provide this information to appropriate personnel or authorities.

**CAUTION: Tagging a non-malicious call may result in fines or other penalties.**

*To tag a malicious call:*

- Press the **Tag Call** quick key while the call is in progress.  
See "Quick Key Programming" elsewhere in this guide for information on programming a Tag Call quick key to your phone.
- OR-
- Press **Trans/Conf.**
- Dial **\*55**.

If the call was successfully tagged "Thank You" is shown on the display; otherwise, "Not Allowed" is displayed.

**Note:** Tag Call can be used on active two-party calls only. Calls on hold and conference calls cannot be tagged.

# USING THE APPLICATIONS

## Personal Directory

The Personal Directory provides easy access to your personal address book. The main screen of the directory is your control center for all personal call management. From this screen, you can search entries and make calls.

**Note:** Use the Desktop Tool to add new entries to your Personal Directory.

*To access the Personal Directory:*

- Press **PERSONAL DIRECTORY**.

*To answer calls while in the Personal Directory:*

- Lift the handset or press **HANDSFREE**.

**Note:** To view caller identification, press **PHONE VIEW** to exit the Personal Directory.

*To search the directory:*

- Press an Index quick key corresponding to the first letter of the person's last name.  
-OR-
- Press the **Search** command key, enter the first few letters of the person's name using the dialpad keys, and then press **Search Now** or **OK**.

**Note:** To delete a letter, press the left arrow key. To add a space, press the right arrow key.

*To delete a directory entry:*

- Use the Desktop Tool to delete entries in your Personal Directory.

## Corporate Directory

The Corporate Directory is created and maintained by your System Administrator. From the Corporate Directory screen, you can perform searches, make a call, and view details on entries in the directory.

*To access the Corporate Directory:*

1. Press **ONLINE SERVICES**.
2. Press **Corporate Directory**.

*To answer calls while in the Corporate Directory:*

- Lift the handset or press **HANDSFREE**.

**Note:** To view caller identification, press **PHONE VIEW** to exit the Corporate Directory.

*To search the directory:*

- Press an Index quick key corresponding to the first letter of the person's last name.  
-OR-
- Press the **Search** command key, enter the first few letters of the person's name using the dialpad keys, and then press **Search Now** or **OK**.

**Note:** To move backwards and delete a letter, press the left navigation key. To move forward, press the right navigation key.

## Call Logs

Call Logs track up to 60 of your incoming, outgoing, and missed calls. It provides the name of each called or calling party, the date and time of the call, the phone number, call duration, and the number of calls to or from that particular party.

*To access Call Logs:*

- Press **CALL LOGS**.

*To delete a log entry:*

1. In one of the Call Log screens, press the quick key associated with the entry you want to delete.
2. Do one of the following:
  - To delete an entire entry, press the **Delete Item** command key.
  - To delete all entries from the Call Log screen, press the **Delete All** command key twice.

**Note:** If you choose to Delete All, skip step 1.

*To exit Call Logs:*

- Press **PHONE VIEW**.

*To make an external call from Call Logs:*

1. In the Incoming or Missed Calls screen, press the **Add Prefix to Number** command key.
2. In the first Number to dial field, enter the appropriate prefix.
3. In the second Number to dial field, enter the rest of the phone number.
4. Press the **Dial** command key.

## Speed Dials

Speed Dials is an application that allows access to a list of phone numbers that you can dial with one or two key presses. Use the Desktop Tool to add numbers to the list.

*To make a Speed Dial call:*

- Press **SPEED DIALS**, and then press a quick key associated with a speed call that you have programmed through the Desktop Tool.  
*Use the command keys to display additional pages of numbers (if programmed).*

*To exit Speed Dials:*

- Press **PHONE VIEW**.

## Bookmarks

Bookmarks is an application that allows quick access to a list of URLs (i.e., Internet addresses). You use the Desktop Tool to program the URLs you want to access.

*To access Bookmarks:*

- Press **BOOKMARKS**.

**Note:** You cannot make calls while you are using Bookmarks.

*To view a web page:*

1. Access Bookmarks.
2. In the Bookmarks main screen, press the quick key associated with the web page you want to view.

**Note:** Use the Desktop Tool to program personal URLs that will be accessed by pressing the associated quick keys.

*To exit Bookmarks:*

- Press **PHONE VIEW**.

## Online Services

Online Services provides access to applications and information programmed by your System Administrator for your use. Online services can include company news and events, and company stock quotes.

*To access Online Services:*

- Press **ONLINE SERVICES**, and then press the quick key associated with the service you want to use.

**Note:** You cannot make calls while you are using Online Services.

*To exit Online Services:*

- Press **PHONE VIEW**.

## Mitel Networks IrDA Module

The Mitel Networks IrDA (Infrared Display Adapter) Module provides a wireless connection between Mitel Networks' IP-based ICP and the Palm Handheld Personal Digital Assistant (PDA).

The IrDA Module's Dial by Address Book (DBAB) application enhances the PDA's existing Address Book function by enabling PDA users to select a stored phone number and dial it directly from the PDA. To place a call, point the PDA at the infrared transceiver lens on the 5240 IP Appliance, and then select the PDA's caller identification feature.

The IrDA Module's Telephony Features Integration (TFI) application gives your PDA access to the telephony features available on the 5240 IP Appliance. Through this application, you can create "soft" buttons on your PDA that, when activated, emulate the buttons on your 5240 IP Appliance.

For more information on using the IrDA Module and PDA, refer to the Mitel Networks IrDA Module technical documentation.

### *To launch DBAB:*

- From the PDA's main window, tap the Dial by AB icon.

### *To launch TFI:*

- From the PDA's main window, tap the TFI icon.

**Note:** The first time you launch the TFI application, you will be requested to enter your phone extension number in the TFI Preferences window.

## Speech Recognition

Speech Recognition is an optional feature that allows you to interact with the system using your voice. With Speech Recognition, you can call people by saying their name and interact with the voice mail system using spoken commands. You can take a tutorial from your phone to learn the basics of using Speech Recognition. A user guide is available if you need more assistance. Ask your System Administrator for a copy of the guide.

Do one of the following.

- Lift the handset, and then press **SPEECH RECOGNITION**.
- Press **SPEECH RECOGNITION**.

## USING VISUAL VOICE MAIL

Visual Voice Mail is an application that allows you to visually interact with the voice mail system.



## Setting up your mailbox

Before you can use voice mail, you must first set up your mailbox.

*To set up your mailbox:*

1. Press **VOICE MAIL**.
2. Enter the default passcode ( **999** ).
3. Press the **Login** command key or **OK**.
4. Follow the on-screen instructions to create your personal passcode and to record your name and greeting.

You can change your mailbox setup at any time by using the **User Options** command on the main voicemail screen. See *Changing your Greetings, Name and Passcode* for details.

*To access your mailbox (or other mailboxes on the system):*

1. Press **VOICE MAIL**.
2. Do one of the following:
  - To access your mailbox, enter your passcode.
  - To access another mailbox, enter the mailbox number and passcode.
3. Press the **Login** command key or **OK**.

*To exit your mailbox:*

1. Press the **More Choices** command key.
2. Press the **Log Out** command key.

*To access your mailbox while on a call:*

- Put the call on Hold, and then press **VOICE MAIL**. To retrieve the call, press **PHONE VIEW** to exit the voice mail application.

*To exit the Visual Voice Mail application to make or answer a call:*

- Press **PHONE VIEW**.

## About the Voice Mail main screen

The Voice Mail main screen contains a chronological list of the voice messages in your mailbox, with the most recent message listed first. By default, the first message is selected when the main screen opens. You can scroll through the messages by using the Navigation keys. Messages are marked in the following ways:

<b>Marker</b>	<b>Type of Message</b>
Bold text	New (never played)
! (exclamation mark)	Urgent
🔒	Confidential (cannot be forwarded)
📧	Receipt confirmation (For messages sent by you. To determine who has listened to your message, select it, then press the Play command key.)
📧	Want receipt confirmation (For messages sent to you)

## Sorting Messages

By default, messages display in the order in which they were received from most to least recent. You can re-sort your messages to display,

- new messages first, and then the saved messages,
- alphabetically according to the sender's name with unknown callers listed at the end,
- urgent messages first followed by non-urgent messages.

**Note:** Visual Voice Mail shows the caller ID information for calls from internal extensions that have a voice mailbox. All other calls are display as "Unknown Caller."

*To re-sort messages (applies to current voice mail session only):*

1. From the Voice Mail main screen, press the **More Choices** command key repeatedly, until **Sort Options** appears.
2. Press the **Sort Options** command key.
3. Select a sort option using the Navigation keys.
4. Press the **Done** command key to go back to the Voice Mail main screen.

## Playing messages

*To play messages:*

1. Access your mailbox.
2. Use the Navigation keys to select the message that you want to play.
3. Press the **Play** command key.

*While listening to a Message you can press*

- ⏮ to skip to the end of message
- ⏭ to fast forward five seconds
- ⏪ to rewind five seconds
- ⏮ go to the beginning of message

*After listening to a message you can press*

- Play Message to play the message again
- Dial Sender to call the message sender. When calling outside the system, include the prefix code (usually "9") if one is required to access an external line.
- Mark as Saved to keep the message. Once a message is marked as Saved, it no longer appears as a new message (i.e. bold). Messages, whether played or not, will appear as new until you mark them as Saved.
- Forward to send the message to one or more mailboxes.
- Delete discard the message.
- Make a New Message to send to one or more mailboxes.
- Reply to respond with a message to the sender.

## Making and Replying to Messages

*To reply to a message:*

1. Use the Navigation keys to select the message to which you want to reply.
2. Press the **Reply** command key.
3. Press the **Record a Reply** command key.
4. Record your message (see **Recording Options** below).
5. (Optional) Press the **Add Recipients** command key to send the reply to other mailboxes in addition to the sender's (see **Addressing Options** below).
6. Specify Delivery options if required (see **Delivery Options** below).
7. Press the **Send** command key to send the message.

*To make a new message:*

1. Access your mailbox.
2. Press the **More Choices** command key.
3. Press the **Make a New Message** command key.
4. Press the **Record New Message** command key.
5. Record your message (see *Recording Options* below).
6. Enter one or more recipients (see *Addressing Options* below).
7. Specify Delivery options if required (see *Delivery Options* below).
8. Press the **Send** command key to send the message.

### *Recording Options*

The following quick keys and command keys are available during recording:

<b>Press this key</b>	<b>to</b>
●	start recording (can be used instead of Record New Message or Record a Reply command key)
	pause recording
■	stop recording
▶	resume a paused recording or replay a completed recording
Append	add to your recorded message
Accept	proceed with sending your message
Cancel	stop recording and discard the message

## *Delivery Options*

<b>Press this key</b>	<b>to</b>
Urgent	place the message first in the destination mailbox (es)
Confidential	prevent the recipient(s) of your message from forwarding it
Confirm Receipt	request notification that your message has been heard

## *Addressing Options*

You can specify recipients for your messages by entering mailbox numbers, selecting mailbox owners by name, or by using a distribution list.

<b>To address messages by</b>	<b>Do this</b>
Mailbox numbers	<ul style="list-style-type: none"><li>• Enter the mailbox number, and then click the <b>Add Mailbox to Recipients List</b> command key.</li><li>• Repeat for each additional recipient.</li><li>• Press the <b>Done</b> command key after the last recipient has been entered.</li></ul>
Name	<ul style="list-style-type: none"><li>• Press the <b>Add From Voice Mail Directory</b> command key.</li><li>• Locate the mailbox owner using the Navigation keys, the quick keys on the right, or the <b>Search</b> command.</li><li>• Press the <b>Done</b> command key.</li><li>• Repeat for each additional recipient.</li></ul>
Distribution list	<ul style="list-style-type: none"><li>• Press the <b>Add Distribution List</b> command key.</li><li>• Use the Navigation keys to select a list.</li><li>• Press the <b>Add/Remove</b> command key.</li><li>• Repeat for each additional recipient.</li><li>• Press the <b>Done</b> command key after the last list has been added.</li></ul>

## Recording Memos

*To record a memo to yourself:*

1. Access your mailbox.
2. Press the **More Choices** command key repeatedly until **Record Memo** appears.
3. Press the **Record Memo** command key.
4. Press ● to start recording. (See the previous page for recording options.)
5. Press the **Done** command key.
6. Press the **Log Out** command key.

## Creating Distribution Lists

You can have up to five personal distribution lists, numbered 05 to 09, each containing a group of mailbox numbers. Distribution lists 01 through 04 are set up by the System Administrator for everyone's use.

*To create a distribution list:*

1. Access your mailbox.
2. Press the More Choices command key repeatedly until **Edit Personal Distribution Lists** appears.
3. Use the Navigation keys to select the list to which you want mailboxes added.
4. Press the **Edit** command key.
5. Add mailboxes to the list in either of the following ways:
  - Enter a mailbox number, and then press the **Add Mailbox to Distribution List** command key.
  - Press the **Add From Voice Mail Directory** command key, and then select the user by name.
6. Repeat step 5 for each mailbox that you want to add to your list.
7. Press the **Done** command key.

**Note:** You can also use the Desktop Tool to set up your personal distribution lists.

## Changing your Greetings, Name and Passcode

When you first set up your mailbox you recorded a greeting and your name and selected a passcode. The User Options menu allows you to change these at any time.

There are two types of mailbox greetings: "permanent" and "temporary". You record the permanent greeting when you first set up your mailbox the first time. If there is no temporary greeting, callers accessing your mailbox will hear the permanent greeting. A permanent greeting cannot be very specific because it is worded to cover all situations. To address specific situations such as absences due to travel or vacation, create a temporary greeting that will last for only a specified number of days.

*To change your greetings, name or passcode:*

1. Access your mailbox.
2. Press the **More Choices** command key repeatedly until User Options appears.
3. Press the **User Options** command key.
4. Proceed with recording your greetings or changing your name or passcode. (Use the **Help** command key if you need more information.)







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